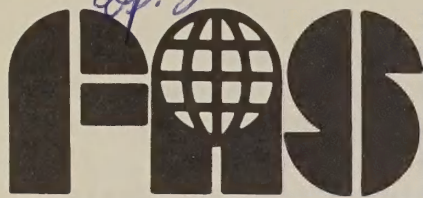


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WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

WR 19-80

WASHINGTON, Sept. 24--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following recent developments in world agriculture and trade:

GRAIN AND FEED

Harvest continues in the SOVIET UNION to be hampered by above-normal precipitation in northern regions of the European USSR. As of Sept. 15, small grains and pulses had been cut on 101.5 million hectares and threshed on 90.4 million. The area cut by this date represented 82 percent of area sown, compared with 84 and 88 percent by the same dates in 1979 and 1978, respectively.

The slow harvesting pace has delayed the sowing of winter grains. Winter crops have been sown on 22.1 million hectares, 53 percent of plan, compared with 22.4 million hectares, 61 percent of plan in 1979.

In AUSTRALIA, drought conditions have developed over some areas of the wheat and barley belts. However, the situation is not yet judged to be critical since normal rainfall amounts during the remainder of September and October could still result in near-normal yields for most of the wheat and barley producing areas.

Conditions in New South Wales, the largest wheat producing state, are fairly good in the central and southern districts. However, serious crop deterioration is occurring in northern districts and bordering areas in southern Queensland. Since these areas produce the bulk of Australia's high protein wheats, the proportion of hard and prime wheats in the total crop is expected to be well below normal this season.

In Western Australia, the second largest producing state, the situation also is somewhat uncertain at this time. Although crops in the northern districts are progressing well, rain is needed and crops are under stress in the more important central and southern areas. Until recently, conditions for the wheat and barley crops in Victoria and South Australia have been generally favorable. During the past weeks, however, precipitation has been well below normal and soaking rains are now needed in those areas as well.

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MARY FRANCES CHUGG, Editor. Tel: (202) 447-3370, 447-2381. Weather and Crop Summary prepared by the Joint Agricultural Weather Facility of USDA and NOAA. Tel: (202) 447-8760, 447-7917. Additional copies may be obtained from the FAS Information Services Staff, Room 5918-South, Washington, D.C. 20250. Tel: 447-7937.

The reduced 1979 manioc crop in THAILAND resulted in lower tapioca shipments to THE NETHERLANDS during the 1979/80 feeding season. Reports from the Netherlands indicate that the short tapioca supplies, plus an estimated 4 percent increase in compound feed production, resulted in greater use of grain, corn gluten feed and meal, citrus pulp, and oilseeds in compound feeds. Preliminary data indicate that use of tapioca is down 27 percent (over 600,000 tons), while use of grain and corn gluten feed have each increased to approximately 325,000 tons. Although the tonnage increases are roughly the same, the percentage increases over 1978/79 are approximately 13 percent for grain and 29 percent for corn gluten meal.

COTTON

The SOVIET cotton harvest has begun earlier than usual, according to the "Agricultural Review" in Izvestiya. The largest producing republic, Uzbekistan, reports 3.4 percent of plan harvested by Sept. 9 and approximately 68 percent of the crop expected to be harvested by machine. Turkmenistan reports 3.1 percent of plan harvested and 9.6 percent of its crop defoliated. Machines are expected to harvest nearly 92 percent of the crop.

Planned total seed cotton output of 9.325 million tons would give lint production of about 13.3 million bales of 480-lb each. Quantities available for export should be up from the 1979/80 season, which may permit exports of 4.2 million bales for 1980/81, compared with an estimated 3.7 million bales last year.

HORTICULTURAL AND TROPICAL PRODUCTS

The 1980 honey outturn in MEXICO is estimated at 58,000 tons, up from 52,000 tons during 1979. Although rainfall has been so light that the honey flow will likely be delayed in the Central Plateau Region and in the State of Sonora, the weather was excellent for the already completed harvest in the important Southeast area, including the Yucatan.

As a result of increased honey output, exports during 1980 are expected to be about 46,000 tons, some 4,000 tons above 1979. Domestic consumption also is likely to rise from around 10,000 tons in 1979 to 12,000 tons in 1980, because of higher prices for sugar and jellies. The average export price for Mexican honey currently ranges from \$900 to \$1,000 a ton, f.o.b. Progreso (Yucatan), about \$100 a ton below a year ago.

Colony numbers in Mexico have continued to rise gradually and now total about 2 million. As a result of a government-sponsored modernization program involving loans and technical assistance to honey producers, approximately three-fourths of the hives are modern types. The 10-percent sales tax on honey products has been eliminated, and a new set of quality standards for honey reportedly is being established. Also, a new cleaning and filtering plant is now producing bulk honey in Merida, Yucatan.

In CANADA, honey production in 1980 is estimated by the government at 29,173 tons, down slightly from 33,000 tons last year. Colony numbers were up from a year earlier, but not enough to offset lower yields resulting from unfavorable weather.

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Despite the smaller honey output in 1980, exports are expected to be larger. Stocks, which were built up during 1979, are now being reduced. During the first five months of 1980, Canada's exports to the United States totaled 541 tons, more than twice as much as a year earlier.

<u>Province</u>	<u>Colonies of bees</u>	<u>Production (metric tons)</u>
Alberta	164,000	10,786
Manitoba	98,000	5,779
Saskatchewan	80,000	5,625
Ontario	110,000	2,744
British Columbia	50,000	2,041
Quebec	98,000	1,778
Other	12,000	420
Total	612,000	29,173

MEXICO's 1980/81 citrus crop is likely to be smaller than last season's good harvest. Extended dry weather through the spring and summer stressed the crop in all major producing areas except Veracruz. Fruit sizes will be smaller than normal.

Despite reportedly strong prices for citrus in the domestic market, exporters maintain supplies will be sufficient to meet Mexico's traditional export markets. In the 1979/80 season, U.S. imports accounted for approximately 3,040 tons of grapefruit, 14,340 tons of oranges, and 18,510 tons of tangerines. Lime imports by the United States were 15,150 tons in April-March 1979/80 and 5,940 tons in April-July 1980. U.S. imports of frozen concentrated orange juice (FCOJ) totaled 1,806,000 gallons (single-strength equivalent) during Dec. 1979-July 1980, down 67 percent from the same period in 1978/79.

In FRANCE, the 1980 walnut crop is estimated currently at 27,000 tons, compared with 20,300 tons last season. The Bordeaux area accounts for the largest share of the increase. The quality of the crop appears excellent in the Grenoble area, which normally supplies between one-third and one-half of the crop. Grenoble growers are hoping to have a 15-percent increase in prices this year to about 6 Francs per kilogram (approximately 67 U.S. cents a pound).

NEW RELEASES OF FOREIGN AGRICULTURE CIRCULARS

Outlook for 1980 USSR Grain Production, FG 24-80
 Prospective Outlook for Grain in the USSR, FG 25-80
 World Grain Situation, Outlook for 1980/81, FG 26-80
 Tobacco in Malawi, FT 3-80

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INTERNATIONAL WEATHER AND CROP SUMMARY, September 15-21, 1980

EUROPE--The weather cleared during the week in central and eastern countries, providing favorable conditions for final harvesting of spring grains. The fair weather also favored winter grain sowing, and soil moisture should have been good in nearly all areas. Temperatures in the east dipped briefly below freezing, but with no significant impact, since no extreme readings occurred and conditions warmed again quickly. A frontal system moving in from the west at the week's end dropped relatively abundant rainfall over much of France. Substantial amounts fell southward into Spain as well, wetting soils in advance of winter grain sowing.

USSR--Harvest weather improved in many northwestern winter grain areas, but slightly-above-normal rains in parts of southern Belorussia disrupted late harvest activity. Temperatures remained above normal, allowing development of newly sown winter grains. Relatively heavy rains fell across the major part of the winter grain belt. This moisture probably interfered with sowing activity, especially in the eastern Ukraine, but parts of the North Caucasus needed the rains, having become too dry in July and August. As the storm spread to the northeast, it caused relatively heavy rains in the upper Volga Valley, where wet conditions have hampered harvest since the middle of August. This was followed by strong, post-frontal winds which probably caused lodging in some fields still uncut.

In the New Lands, harvest weather improved dramatically in the north, where greatest field activity is centered. Light rain fell only at scattered locations and temperatures surged much above normal.

SOUTH ASIA--Relatively dry weather continued in northwestern India as westerly winds kept rains to the east. A vigorous storm moved in through Orissa from the east, drifted northward into Uttar Pradesh, and then dissipated against the Himalayas. This storm left heavy rainfall totals in its path, which was not favorable for maturing rice. In spite of persistent, excessively wet weather in central and eastern portions of northern India, and an apparent early termination of the monsoon in the northwest, Indian officials are anticipating a record rice harvest. Major cotton areas in Gujarat have been receiving below-normal rainfall since early August, putting some stress on cotton, which should now be in the flowering and boll-setting stages. To the south, rainfall increased in previously dry areas of Karnataka and Tamil Nadu. If the moisture persists, it will allow planting of late-season crops.

CHINA--Good harvest weather prevailed in the middle and lower Yangtze Valley early in the week. Typhoon Percy moved inland at Shanghai and dumped relatively heavy rainfall over lower portions of the valley on the weekend, but no extreme rainfall totals were recorded. Most other important agricultural areas had favorable harvest weather for the entire week, but wet conditions persisted in the Sichuan Valley, where the intermediate-rice crop is little more than half harvested.

SOUTHEAST ASIA--Eastern Thailand received significant rainfall largely from the remnants of Typhoon Ruth as it passed over Indochina early in the week. Above-average weekly totals of over 100 mm fell in this portion of Thailand, as well as in northern Vietnam and Laos. Further west in Thailand, below-average rain fell on much of the rice growing area, except for a narrow band in the Central Plains, where over 100 mm were reported. It is important for the wet-season rice crop to receive ample moisture in September before the tropical monsoon season tapers off.

AUSTRALIA--Significant rainfall (10 to 25 mm) was restricted to coastal portions of West Australia and Victoria, as well as in southern New South Wales. Moisture supplies remain adequate for the wheat crop, now in vegetative growth, in both South Australia and Victoria. However, moisture stress is increasing in portions of West Australia, New South Wales and Queensland. The situation is becoming critical in northern New South Wales and Queensland, where the crop is most advanced. Rain is needed within the next few weeks as the crop passes through reproduction and into grain formation.

CANADA--A series of low pressure systems moved through the Canadian Prairies, producing shower activities almost everyday this week. Smallest amounts (10 mm or less) occurred in western Saskatchewan. Elsewhere in the wheat belt, weekly rainfall totals were generally 10 to 25 mm. The wet, humid weather continues to impede harvesting activities. Fields are too wet for combining and sprouting has occurred in swathed fields.

SOUTH AMERICA--Dry weather continued in Argentina's wheat belt, which includes the Provinces of Buenos Aires, La Pampa, Cordoba, Santa Fe and Entre Rios. Topsoil moisture is low and rain will be needed to meet the moisture demand of the crop as it advances through vegetative growth. Cold temperatures produced scattered frost in northeastern Argentina on the 15th and 16th. Wheat, however, has a higher resistance to frost during vegetative growth. The scattered light frost did not pose a serious problem to citrus in northern Argentina. In Brazil, weekly totals in Rio Grande do Sul State generally ranged from less than 10 mm in the south to 15 to 25 mm in the north. However, locally heavy rain (50 to 100 mm) occurred in northeastern Rio Grande do Sul and northern Parana States. Moisture is adequate for Brazil's wheat crop at this time.

MEXICO--High pressure aloft maintained unseasonably dry weather over the North and well into the Southern Plateau. Heavy showers fell along the southern coasts and Yucatan Peninsula. Most of the major citrus, vegetable, cotton and corn production areas were hot and dry, which was excellent for field work and crop maturation but depleted soil moisture. Some northeastern citrus fruit is probably not sizing well because of moisture stress. Rainfall was very light over the northwestern watersheds in contrast to heavy amounts in previous weeks of the current rainy season.

Rotterdam Prices and E.C. Import Levies:

Asking prices in U.S. dollars for imported grain, soybeans and tapioca, c.i.f., Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item	Sept. 23, 1980		Change from previous week	A year ago
	Dollars per metric ton	Dollars per bu.	Cents per bu.	Dollars per metric ton
Wheat:				
Canadian No. 1 CWSR-12.5%..	1/	1/	1/	1/
U.S. No. 2 DNS/NS: 14%.....	216.00	5.88	+8	202.50
U.S. No. 2 DHW/HW:13.5%.....	214.00	5.82	+10	207.00
U.S. No. 2 S.R.W.....	210.00	5.72	+28	196.00
U.S. No. 3 H.A.D.....	299.00	8.14	-5	244.00
Canadian No. 1 A: Durum.....	1/	1/	1/	256.00
Feedgrains:				
U.S. No. 3 Yellow Corn.....	161.75	4.11	0	142.50
U.S. No. 2 Sorghum 2/.....	172.00	4.37	-5	143.00
Feed Barley 3/.....	176.00	3.83	+9	166.00
Thailand Tapioca.....	179.00	--	-1.15 5/	--
Soybeans:				
U.S. No. 2 Yellow.....	340.50	9.27	+38	294.25
Argentine 4/.....	335.50	9.13	+36	286.00
U.S. 44% Soybean Meal (M.T.)	307.00	--	+17.00 5/	240.00
EC Import Levies				
Wheat 6/.....	101.20	2.75	-20	99.80
Barley.....	88.00	1.92	-12	84.60
Corn	104.75	2.66	-5	109.90
Sorghum.....	93.10	2.36	+6	104.95

1/ Not available.

2/ Optional delivery: U.S. or Argentine Granifero Sorghum.

3/ Optional delivery: U.S. or Canadian Feed Barley

4/ Optional delivery: Brazil Yellow

5/ Dollars per metric ton.

6/ Durum has a special levy.

NOTE: Basis October delivery.

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